

Adora AI Pin Roadmap – Investor Overview

Adora AI | May 2025

1 | Executive Summary

The **Adora AI Pin** is a pocket-sized, screen-less wearable that captures 4K wide-angle video, performs low-power computer-vision on-device, and syncs securely with the user’s phone via **NFMI** (Near-Field Magnetic Induction). A fully sealed enclosure, wireless charging, IP 69 durability, and on-device encryption position the Pin as the secure “eyes & ears” of Adora AI in medical, field-service, and consumer life-logging markets. First mass production run: **100 000 units, Q4 2026**.

2 | Product Vision & Differentiation

Vision – “Hands-free, privacy-first computer-vision in a device you forget you’re wearing.”

- **Zero-trust security** – NFMI dock injects time-boxed session keys; no BLE pairing; data ring-buffer encrypted by a dedicated secure element.
- **Battery endurance** – Ultra-low-power MCU offloads heavy CV to the phone, delivering **4h mixed use** versus <1 h for action cams.
- **IP 69, no ports** – bonded two-shot housing + wireless charging eliminates ingress risk and reduces cleaning downtime in healthcare.
- **Enterprise data pipeline** – Captured context feeds straight into Adora AI workflows (charting, field-inspection, note-taking) with automatic PHI redaction.

3 | Core Specs (Rev B design)

Category	Spec	Note
Camera	1/2.3" CMOS, 4K 30 fps, 155° FoV	HDR, gyro-stabilised
Compute	Ambiq Apollo4 Plus MCU + ISP	<4mW CV overlay
Storage	32GB eMMC (AES-256)	45min raw 4K buffer
Connectivity	Wi-Fi 6, BT LE Audio	Phone offload & live streaming

Charging / Keys	NFMI 5 W + 27 MHz key channel	Dock = key vault
Battery	350 mAh Li-Po	4 h mixed use
Enclosure	PC/LSR over-mold, laser-weld	IP 69, 2.6 × 1.37 × 0.70 in, 78 g

4 | Unit Economics (100 k run)

Metric	Value
Landed ex-warehouse cost	\$74.50
Enterprise bulk price (≥1 000)	\$100 (~25 % GM)
Standard wholesale	\$149 (50 % GM)
Direct-to-consumer MSRP	\$349 (78 % GM)
Replacement docks & clips	\$29 MSRP, 65 % GM

Hardware becomes a **profit center** even for enterprise clients while reinforcing SaaS lock-in.

5 | Development Phases & Success Gates

Phase	Timeline	Key deliverables	Go/No-Go metric
EVT-B	Jun–Jul 2025	NFMI coil prototype, key-exchange firmware, thermal / power profile	5 W charge <35 °C, <30 ms encrypt latency
DVT	Aug–Oct 2025	Sealed housing + pressure-wash test, FCC/NCC pre-scan	IP 69 pass, SAR <1.6 W/kg
PVT / Beta (5k)	Q2 2026	Pilot to 10 medical & 5 field-service orgs	<2 % RMA, NPS > 60
MP (100k)	Q4 2026	Ramp at EMS partner, enterprise & DTC launch	95 % on-time yield, <\$75 landed cost

6 | Monetization Levers Beyond Hardware

- **Session-key SaaS license** – annual \$9/Pin secure-key management fee (99% GM).
- **Workflow-triggered compute** – Pin footage auto-summarised; draws from Org token wallet (adds ARR per seat).
- **Accessory ecosystem** – magnetic mounts, lens covers, lanyards; 60-70% GM.
- **Advanced analytics pack** – Optical quantification (wound size, equipment serial capture) sold per-module to healthcare.

7 | Strategic Impact for Adora AI

Driver	Impact
Hardware moat	Competitors rely on phones; Pin gives Adora proprietary data capture with superior privacy.
ARR accelerator	Footage ingestion increases token usage + drives higher-tier SaaS adoption.
Vertical entry	Medical, field-service, and heavy-industry use-cases open net-new enterprise verticals.
Data advantage	On-device CV + workflow metadata strengthens model fine-tuning and product differentiation.

8 | Action Plan

1. Finalize NFMI coil stack & shielding (engineering lock by Week 6).
2. Secure Ambiq & camera module volume allocation (LOI by Week 8).
3. Kick-off enclosure tool design with over-mold vendor (quote & DFM by Week 10).
4. Draft enterprise pilot MoU template; line up first 3 medical sites (Month 3).
5. Submit provisional patent addendum for NFMI key-exchange (Month 3).